

# Creating a Planned Schedule & Electronic Checklist for multiple assets.

## Creating the checklist in the Form Designer.

- Make sure the main form section setting, 'Is Repeatable' is set to TRUE.
- Your first Question must be of type 'Asset'
- After saving the first question, click the pencil icon and set:
  - – Include Select By Dropdown to NO
  - – Include Create Asset to NO
  - – Include Scan Asset to NO
  - – Select your Asset class (Required)
  - – Select your Asset Sub class (Not Required)
  - – Prepopulate Asset to YES
- Click save
- Create all your other question for the checklist.

## Creating the Planned Schedule in the Planned Maintenance Module.

- Click New Schedule
- Give your schedule a name etc
- Set 'By Site, Location or Asset' to 'By Asset'
  - – Select your Asset class (Required) – **This must correspond with the settings in the form above.**
  - – Select your Asset Sub class (Not Required) – **This must correspond with the settings in the form above.**
- Set the rest of the settings in your schedule and click Save.
- In the section labelled 'Forms – Inspections, Risk Assessments etc' click add form and attach your form to the schedule.

- Now click the 'Back' button.
- Now click the green arrow beside the schedule name.
- Use the filters to minimise your list of assets.
- Be sure to have all your asset you want to attach to the electronic form visible on the list.
- Click the checkbox in the top left of the grid to attach all the assets in one go.
- Set your due date, assigned user and resource and confirm.